



# **Division of Technology Services**

DEVELOPMENT AND APPLICATION SUPPORT

## Comprehensive Survey Tool

Provider User Guide for DA



# Table of Contents

<b>1.0</b>	<b>Introduction – The Comprehensive Survey Tool .....</b>	<b>4</b>
1.1.	Product Support .....	4
1.2.	How to Obtain a Provider Representative Login .....	4
1.3.	Product Comments or Feedback .....	4
<b>2.0</b>	<b>Overview – Reviewing and Entering a Corrective Action Plan (CAP).....</b>	<b>5</b>
2.1	Viewing Survey Findings.....	6
2.2	Search Option to Find a Survey .....	8
2.3	The Findings Link.....	10
2.4	List of Findings .....	11
2.5	View CAP Link.....	12
2.6	CAP Details Screen.....	13
2.7	Findings Screen.....	15
<b>3.0</b>	<b>Uploading and Viewing Documents .....</b>	<b>16</b>
3.1	Upload a Document .....	16
3.2	View an Uploaded Document .....	23
3.3	Delete an Uploaded Document .....	24
<b>4.0</b>	<b>Overview – (Case Manager) Working with Submitted CAPs.....</b>	<b>26</b>
4.1	Review CAPs (Case Manager/Provider Representative) .....	27
4.2	Search Option to Find a Survey .....	28
4.3	The Findings Link.....	30
4.4	List of Findings .....	31
4.5	Enter Case Manager Notes.....	33
4.6	Email a CAP .....	34
	<b>Table of Figures .....</b>	<b>36</b>

## **1.0 Introduction – The Comprehensive Survey Tool**

The Comprehensive Survey Tool (CST) is a Web-based tool that you can use to:

- Review survey findings.
- Enter a Corrective Action Plan (CAP).
- Upload and view documents.
- Work with a submitted CAP.

### **1.1. Product Support**

Use of the CST requires that you possess a unique login username and password that is assigned to you by the Provider Representative for your organization. If you encounter an issue regarding the login process, contact this individual.

After login, if you encounter a problem with this product, or if you have a question or recommendation regarding this user guide, contact the Development and Application Support (DAS) Help Desk team at:

[DTS-DAS@fssa.IN.gov](mailto:DTS-DAS@fssa.IN.gov)

A member of the DAS Help Desk team will contact you to address the issue.

### **1.2. How to Obtain a Provider Representative Login**

If you are the Provider Representative for an organization and you need a user name and password, contact the DAS Help Desk team at:

[DTS-DAS@fssa.IN.gov](mailto:DTS-DAS@fssa.IN.gov)

A member of the DAS Help Desk team will send you the user name and password information.

### **1.3. Product Comments or Feedback**

Providers are encouraged to send feedback on the automated CST to:

[B2ISHelp@fssa.in.gov](mailto:B2ISHelp@fssa.in.gov)

## 2.0 Overview – Reviewing and Entering a Corrective Action Plan (CAP)

1. Navigate to the Provider Website at <https://ddrsprovider.fssa.in.gov/BDDS/>.
2. Log in by using your username and password.
3. Click the **Survey List** link under the **CST** menu on the left side of the screen.
4. Search for the survey by using the search option or pick the survey from the list of surveys.
5. Click **Findings** next to a survey that contains **New** in the **Status** column. The system displays a list of findings.
6. Locate the finding you want to view from the list.
7. Click the **View** hyperlink under the **CAP** column next to the finding you want to view.
8. Complete the information in the **For Provider Only** section of the screen (all fields are required).
9. Click the **Save** button to save what's been entered without submitting the CAP.
10. Click the **Submit** button to submit the CAP.

## 2.1 Viewing Survey Findings

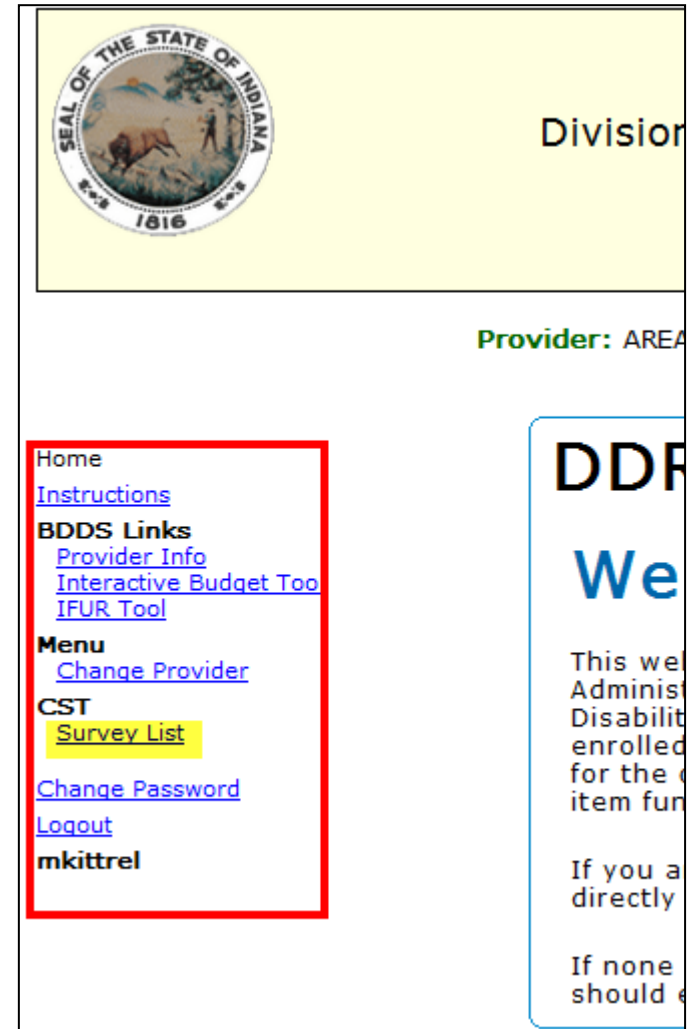
This section of the *Provider CST User Guide for DDRS* describes how to view survey findings.

Navigate to the Provider Website at:

<https://ddrsprovider.fssa.in.gov/BDDS/>.

Log in by using your username and password.


Click on the **Survey List** link under the **CST** menu (*Figure 1*) on the left side of the screen.



*Figure 1 - CST Survey List Link*

The **Survey List** screen appears, as shown in (*Figure 2*).

Division of Aging  
Comprehensive Survey Tool



**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Survey List**

Client Last Name

Client First Name

Survey Name

Search

Client Name	Survey ID	Status			
Rubble, Bam Bam	23739	CAP Needed	<a href="#">Findings</a>	<a href="#">Documents</a>	<a href="#">Schedule</a>

*Figure 2 - Survey List Screen*

## 2.2 Search Option to Find a Survey

There is a search option on the **Survey List** screen (**Figure 3**) that allows you to search for a survey based on one or more of the following pieces of information for the client:

- Last Name
- First Name
- Survey Name

The screenshot shows the 'Comprehensive Survey Tool' interface. At the top, it says 'Division of Aging' and 'Comprehensive Survey Tool'. Below that, it displays 'Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT'. There is a link for 'Survey List'. A 'Search option' box is highlighted with a red border. Inside this box, there are three input fields: 'Client Last Name', 'Client First Name', and 'Survey Name', each with a corresponding search button. Below the search fields, there is a table header with columns: 'Client Name', 'Survey ID', and 'Status'.

Figure 3 - Survey Search Option



**For Example** To locate a survey based on a client's first name and the first two letters of the client's last name, you would enter the information into the **First Name** field and the **Last Name** field.



Once you've entered the search criteria, click the **Search** button (*Figure 4*) to display a list of surveys that meet the search criteria (*Figure 5*).

**Comprehensive Survey Tool**

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Search option**

**Survey List**

Client Last Name Client First Name Survey Name

Rubble [ ] [ ] Search

Client Name	Survey ID	Status
-------------	-----------	--------

*Figure 4 – Search for a Survey*

**State of Indiana**

**Division of Disability and Rehabilitative Services**

**Division of Aging**

**Comprehensive Survey Tool**

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Survey List**

Client Last Name Client First Name Survey Name

[ ] [ ] [ ] List of Surveys meeting the search criteria

Client Name	Survey ID	Status	Findings	Documents	Schedule
Rubble, Bam Bam	23739	CAP Needed	<a href="#">Findings</a>	<a href="#">Documents</a>	<a href="#">Schedule</a>

*Figure 5 - List of Surveys*

Latest Revision:  
4/21/2010

## 2.3 The Findings Link

The list of surveys displays the:

1. Client Name
2. Survey ID
3. Survey Status

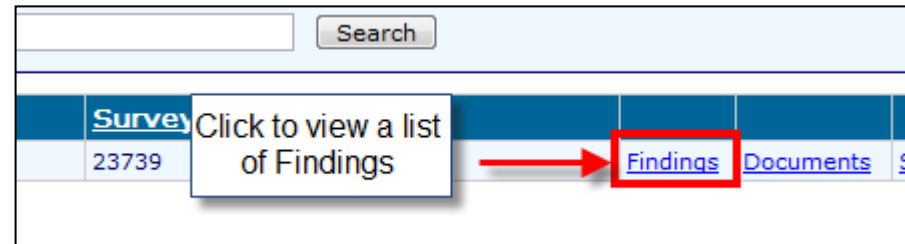


Figure 6 - Findings Link

**For Example** The survey **Status** reflects that a CAP is needed and that there are findings. To see the findings for the survey, click the **Findings hyperlink (Figure 6)**.



## 2.4 List of Findings

When the **List of Findings** screen opens, a list of relevant **Survey Details** is displayed just below the Provider's name (*Figure 7*).

**State of Indiana**  
 Division of Disability and Rehabilitative Services  
 Division of Aging  
 Comprehensive Survey Tool

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**List of Findings**

**Survey Detail**

Survey ID: 23739

Survey Status: CAP Needed

Client Name: Rubble, Bam Bam

Waiver: AD

Surveyor Name: Demo Coordinator

Coordinator Name: Demo Coordinator

Date IST Met (DDRS Only):

Comprehensive CAP completion due date: 10/19/2009

Comprehensive CAP reviewed by case manager due date: 10/19/2009

Date Comprehensive CAP reviewed and locked by Case Manager:

Date Comprehensive CAP closed by surveyor:

**Survey Details**

Vendor ID	Provider	Survey Name	Indicator ID	Finding Narrative	Service	Date CAP Entry Complete	St
-----------	----------	-------------	--------------	-------------------	---------	-------------------------	----

*Figure 7 - List of Survey Findings - Survey Details*

## 2.5 View CAP Link

Below the Survey Details the list of Survey Findings is displayed.

As a Provider, you can view findings for any of the providers displayed in the **Findings** window.

To enter a CAP for a finding, click the **View** link next to the finding (*Figure 8*).

Vendor ID	Provider	Survey Name	Indicator ID	Finding Narrative	Service	Date CAP Entry Complete	Status	CAP
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.2	This is a test finding for question 1.a.1.2			New	<a href="#">View</a>
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.3	This is a test finding for question 1.a.1.3	CMGT		New	<a href="#">View</a>

*Figure 8 - List of Survey Findings - View Link*

## 2.6 CAP Details Screen

**State of Indiana**  
 Division of Disability and Rehabilitative Services  
 Division of Aging  
 Comprehensive Survey Tool



**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**CAP Details** [Back to Findings](#)

Survey ID:	23739
Survey:	DA Provider Compliance Consumer Satisfaction Tool
Client Name:	Rubble, Bam Bam
Provider:	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT
Vendor ID:	33
Service:	CMGT
Indicator ID:	I.A.1.2
Survey Question:	The person receives an evaluation to determine their eligibility for Waiver services.
Finding Narrative:	This is a test finding for queston 1.a.1.2
CAP Status:	<b>Reviewed</b>
Date CAP Entry Complete:	10/6/2009
Date CAP Locked:	10/7/2009
Date Accepted:	
Date Denied:	
Denied Reason:	

**For Provider Only**

Date Planned Implementation:

**Figure 9 - CAP Details Screen**

The upper portion of the **CAP Details** screen (**Figure 9**) displays the following fields:

- |               |             |                     |                           |                 |
|---------------|-------------|---------------------|---------------------------|-----------------|
| • Survey ID   | • Provider  | • Indicator ID      | • CAP Status              | • Date Accepted |
| • Survey Name | • Vendor ID | • Survey Question   | • Date CAP Entry Complete | • Date Denied   |
| • Client name | • Service   | • Finding Narrative | • Date CAP Locked         | • Denied Reason |

Beneath this section of the screen is the **For Provider Only** section (*Figure 10*). This area is where the provider enters all the elements of the CAP. To enter information into a field, click in the field with your mouse.

**For Provider Only**

Date Planned Implementation:

Title of Responsible Person:

Name of Responsible Person:

Corrective Action Plan:

Enter information into the yellow highlighted fields.

Save Submit

*Figure 10 - Enter CAP in For Provider Only Section*

Click the **Save** button to save what's been entered without submitting the CAP.

Click the **Submit** button to submit the CAP.

Save Submit

*Figure 11 - CAP Details Screen - Save and Submit Buttons*

## 2.7 Findings Screen

Once the CAP has been submitted, the status on the **Findings** screen will change from **New** to **Submitted** with the date that the CAP was submitted (*Figure 12*).

Date Comprehensive CAP closed by surveyor:								
<u>Vendor ID</u>	<u>Provider</u>	<u>Survey Name</u>	<u>Indicator ID</u>	<u>Finding Narrative</u>	<u>Service</u>	<u>Date CAP Entry Complete</u>	<u>Status</u>	<u>CAP</u>
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.2	This is a test finding for question 1.a.1.2	CMGT	10/6/2009	Submitted	<a href="#">View</a>
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.3	This is a test finding for question 1.a.1.3	CMGT	10/7/2009	Submitted	<a href="#">View</a>

*Figure 12 – Findings Screen with CAP Submitted Status*

### 3.0 Uploading and Viewing Documents


Providers have the ability to upload documents to the CST system via the Provider Website.

#### 3.1 Upload a Document

To upload a document, the provider navigates to the [Survey List](#).

Once the **Survey List** appears, click on the **Documents** link (*Figure 13*) to view or upload documents to the Provider Website.

**State of Indiana**  
 Division of Disability and Rehabilitative Services  
 Division of Aging  
**Comprehensive Survey Tool**



**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Survey List**

Client Last Name   Client First Name   Survey Name

Client Name	Survey ID	Status			
Rubble, Bam Bam	23739	CAP Needed	<a href="#">Findings</a>	<a href="#">Documents</a>	<a href="#">Schedule</a>

*Figure 13 - Documents Link*



To upload a document click the **Upload document** button (*Figure 14*) to display the **Document Upload** window (*Figure 15*).

**State of Indiana**  
Division of Disability and Rehabilitative Services  
Division of Aging  
Comprehensive Survey Tool

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, B  
Vendor ID: 33  
Provider: AREA 7: W  
No documents found.

☒ **Upload document**

Click the **Upload document button** to upload documents from your computer to the CST System.

*Figure 14 – Upload Document Button*

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, Bam Bam  
Vendor ID: 33  
Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT  
No documents found.

☒ **Upload document**

**Document Type**  
Select

**Document Description**

Select a document to upload.

No file chosen

Document Upload window

*Figure 15 – Document Upload Window*

Select a document type from the drop-down menu (*Figure 16*).

The screenshot displays the 'Survey List' interface. At the top, there is a link for 'Survey List'. Below it, the 'Documents' section shows fields for 'Survey ID: 23739', 'Client Name: Rubble, Bam Bam', 'Vendor ID: 33', and 'Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT'. A message states 'No documents found.' Below this is an 'Upload document' button. The 'Document Type' drop-down menu is open, showing a list of options: 'Select', 'Behavior Support Plan', 'Credentialing Policy', 'Criminal Background Check', 'Data Collection Documents', and 'Mealtime or Dining Plan'. A red box highlights the list of options, and a callout box points to the drop-down menu with the text 'Document Type drop-down menu'.

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, Bam Bam  
Vendor ID: 33  
Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

No documents found.

**Upload document**

Document Type

Select

- Select
- Behavior Support Plan
- Credentialing Policy
- Criminal Background Check
- Data Collection Documents
- Mealtime or Dining Plan

*Figure 16 - Document Type Drop-down Menu*

Type a description of the document in the **Document Description** field (*Figure 17*).

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, Bam Bam  
Vendor ID: 33  
Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT ▼

No documents found.

**Upload document**

Document Type  
Select ▼

Document Description  
Type a description of the document in this field

Select a document to upload.

No file chosen

*Figure 17 - Document Description Field*

Use the **Choose File** button to open a browser window.

Select a document on your computer to upload to the CST system (*Figure 18*).

**State of Indiana**  
**Division of Disability and Rehabilitative Services**  
**Division of Aging**  
**Comprehensive Survey Tool**

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, Bam Bam  
Vendor ID: 33  
Provider: AREA 7: WEST CENTRAL INDIANA

No documents found.

**Upload document**

Document Type  
Behavior Support Plan

Document Description

Select a document to upload.

**Choose File** Provider Web Issue.doc

**Upload File**

**Browser Window**

Name	Date modified	Type	Size	Tags
Provider Web Issue				

Provider Web Issue

All Files

Open Cancel

*Figure 18 - Choose File Button*

Once you've selected the document to be uploaded, click the **Upload File** button (*Figure 19*).

Survey ID:	23739
Client Name:	Rubble, Bam Bam
Vendor ID:	33
Provider:	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT ▼

Type	Document Description	Document Name	Date Upd
Behavior Support Plan		Provider Web Issue.doc	10/7/2009

⬆ Upload document

Document Type  
Behavior Support Plan ▼

Document Description

Select a document to upload.

Choose File

Upload File Document uploaded.

*Figure 19 - Upload File Button*

When the document has been successfully uploaded, it will appear in the list of uploaded documents (*Figure 20*).

[Survey List](#)

**Documents**

Survey ID: 23739  
Client Name: Rubble, Bam Bam  
Vendor ID: 33  
Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

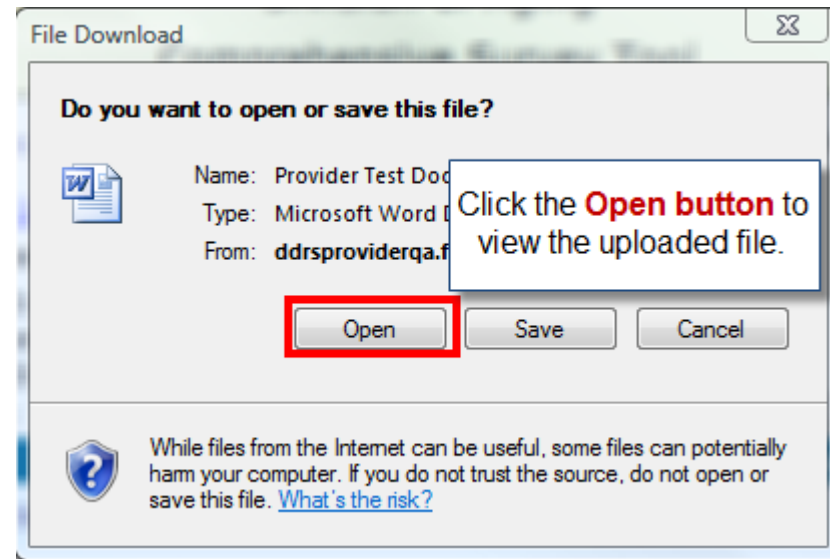
List of uploaded documents

Type	Document Description	Document Name	Date Uploaded	View	Delete
Behavior Support Plan		Provider Web Issue.doc	10/7/2009	<a href="#">View</a>	<a href="#">Delete</a>
Behavior Support Plan		Provider Test Document 1.doc	10/7/2009	<a href="#">View</a>	<a href="#">Delete</a>

*Figure 20 - List of Uploaded Documents*

### 3.2 View an Uploaded Document

To view the uploaded document, click the **View** button. The **File Download** dialog box (*Figure 21*) appears asking whether you want to Open or Save the file. Click the **Open** button to open and view the document.



*Figure 21 – File Download Dialog Box*

### 3.3 Delete an Uploaded Document

On the List of uploaded documents screen (*Figure 22*) click the **Delete** link next to the document you wish to delete.

[Survey List](#)

**Documents**

Survey ID: 23739  
 Client Name: Rubble, Bam Bam  
 Vendor ID: 33  
 Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

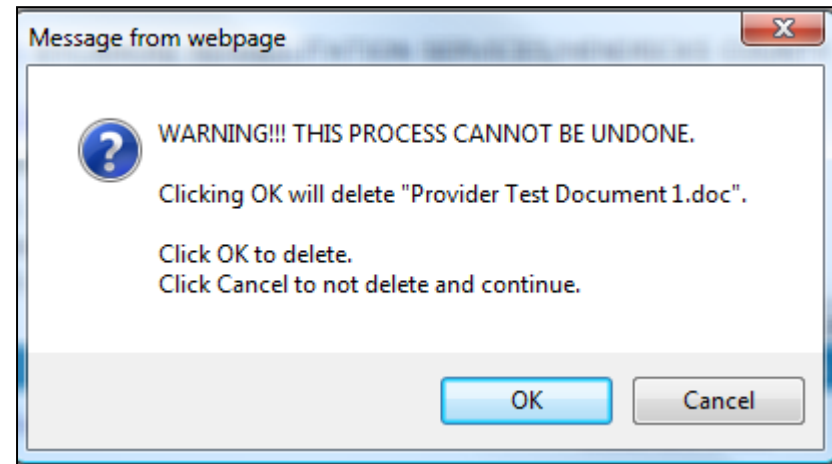
List of uploaded documents

Type	Document Description	Document Name	Date Uploaded	View	Delete
Behavior Support Plan		Provider Web Issue.doc	10/7/2009	<a href="#">View</a>	<a href="#">Delete</a>
Behavior Support Plan		Provider Test Document 1.doc	10/7/2009	<a href="#">View</a>	<a href="#">Delete</a>

*Figure 22 - List of Uploaded Documents Screen - Delete Link*



A warning message (*Figure 23*) appears on the webpage. If you want to delete the document, click the **OK** button.



*Figure 23 - Warning Message*

## 4.0 Overview – (Case Manager) Working with Submitted CAPs

1. Navigate to the Provider Website at <https://ddrsprovider.fssa.in.gov/BDDS/>
2. Log in as a Case Manager by using your username and password.
3. Click the **Review Submitted CAPs** link under the **CST** menu on the left side of the screen.
4. Search for the survey by using the search option or pick the survey from the list of surveys.
5. Click **Findings** next to the survey whose findings you want to review. The system will display a list of findings.
6. Locate the finding you want to view from the list.
7. Click the **View** hyperlink under the **CAP** column next to the finding you want to review.
8. After reviewing a CAP, navigate to the **For Case Manager Only** section of the screen.
9. Enter one or more notes in the **Case Manager Notes** field.
10. Click the **CAP Reviewed** check box.
11. Click the **Save** button to save the Case Manager notes and to indicate that a Case Manager reviewed the CAP.
12. To e-mail the CAP, click the **Email CAP to your supervisor if required** link to open an e-mail form.
13. Enter the recipient's name in the **To:** field on the e-mail form.
14. Enter a message into the **Body:** field on the e-mail form.
15. Click the **Send CAP** button. The “**CAP was successfully emailed to recipient**” confirmation message appears below the E-mail form.
16. When the Case Manager or Provider Representative completes the review of submitted CAPs in the Survey List, click the **Submit Reviewed CCAP** button to notify the surveyor.

#### 4.1 Review CAPs (Case Manager/Provider Representative)

Navigate to the Provider Website at <https://ddrsprovider.fssa.in.gov/BDDS/>.

Log in by using your Case Manager or Provider Representative username and password.

Click on the **Review Submitted CAPs** link under the **CST** menu (*Figure 24*) on the left side of the screen.

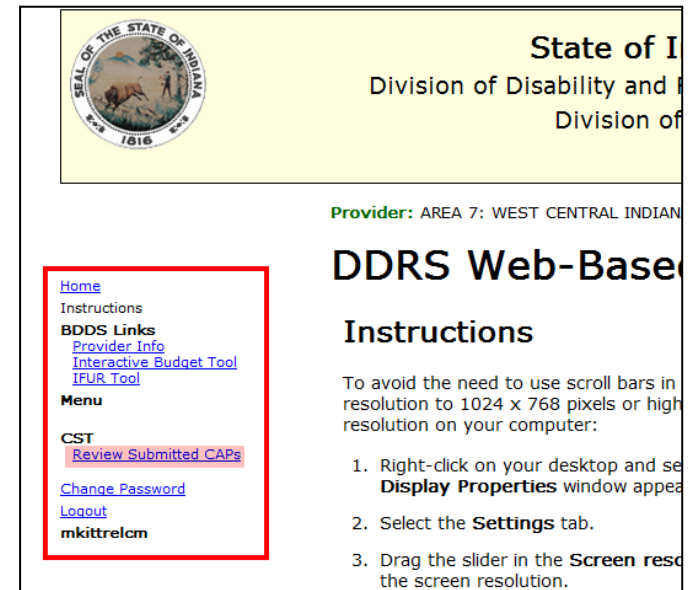


Figure 24 - Review Submitted CAPs

The **Survey List** screen appears (*Figure 25*).

The screenshot shows the Survey List screen. At the top, there is a header for the State of Indiana, Division of Disability and Rehabilitative Services, and Division of Aging. Below this, the provider is identified as AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT. The main heading is 'Survey List'. Below the heading, there is a search bar with fields for Client Last Name, Client First Name, and Survey Name, and a Search button. Below the search bar, there is a table with columns: Client Name, Survey ID, Status, Findings, Documents, and Schedule. The table contains one row of data for Rubble, Bam Bam, with Survey ID 23739 and Status CAP Needed.

Client Name	Survey ID	Status	Findings	Documents	Schedule
Rubble, Bam Bam	23739	CAP Needed			

Figure 25 - Survey List

## 4.2 Search Option to Find a Survey

There is a search option on the **Survey List** screen (*Figure 26*) that allows you to search for a survey based on one or more of the following pieces of information for the client:

- Last Name
- First Name
- Survey Name

The screenshot displays the 'Comprehensive Survey Tool' interface. At the top, a yellow header bar contains the title. Below it, the provider information is shown: 'Provider: AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT'. A blue link labeled 'Survey List' is visible. A red box highlights the search section, which includes a 'Search option' button and a search form. The search form has three input fields labeled 'Client Last Name', 'Client First Name', and 'Survey Name', followed by a 'Search' button.

*Figure 26 - Search Option*

**For Example** If you wanted to locate a survey based on a client's first name and the first two letters of the client's last name, you would enter the information into the **First Name** field and the **Last Name** field.



Once you've entered the search criteria click the **Search** button (*Figure 27*) to display a list of surveys that meet the search criteria (*Figure 28*).

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Survey List**

Client Last Name Client First Name Survey Name

Rubble

*Figure 27 - Search for a Survey*

**State of Indiana**  
Division of Disability and Rehabilitative Services  
Division of Aging  
Comprehensive Survey Tool

**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

[Survey List](#)

**Survey List**

Client Last Name Client First Name Survey ID

List of surveys meeting the search criteria

Client Name	Survey ID	Status	Findings	Documents	Schedule
Rubble, Bam Bam	23739	CAP Needed	<a href="#">Findings</a>	<a href="#">Documents</a>	<a href="#">Schedule</a>

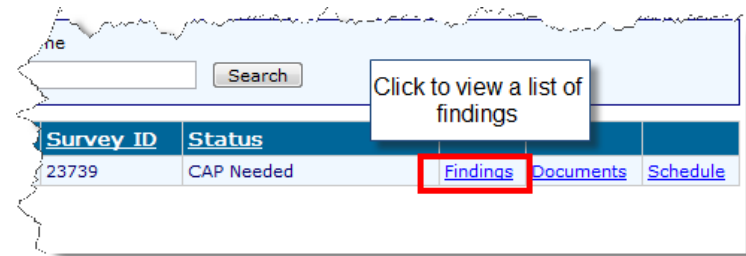
*Figure 28 - List of Surveys Meeting the Search Criteria*

### 4.3 The Findings Link

The list of surveys displays the:

- Client Name
- Survey ID
- Survey Status

**For Example** The survey **Status** reflects that a CAP is needed and that there are findings. To see the findings for the survey, click the **Findings** hyperlink (*Figure 29*).




*Figure 29 - Survey Status*

#### 4.4 List of Findings

When the **List of Findings** screen opens, a list of relevant **Survey Details** is displayed just below the Provider's name (*Figure 30*).

**State of Indiana**  
 Division of Disability and Rehabilitative Services  
 Division of Aging  
 Comprehensive Survey Tool



**Provider:** AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT

Survey List

Survey Details

**List of Findings**

**Survey Detail**

Survey ID:	23739
Survey Status:	CAP Needed
Client Name:	Rubble, Bam Bam
Waiver:	AD
Surveyor Name:	Demo Coordinator
Coordinator Name:	Demo Coordinator
Date IST Met (DDRS Only):	
Comprehensive CAP completion due date:	10/19/2009
Comprehensive CAP reviewed by case manager due date:	10/19/2009
Date Comprehensive CAP reviewed and locked by Case Manager:	
Date Comprehensive CAP closed by surveyor:	

Vendor ID	Provider	Survey Name	Indicator ID	Finding Narrative	Service	Date CAP Entry Complete	Status	CAP
-----------	----------	-------------	--------------	-------------------	---------	-------------------------	--------	-----

**Figure 30 – Survey Details**

Below the **Survey Details** the list of **Survey Findings** is displayed.

As a Provider, you can view findings for any of the providers displayed in the **Findings** window.

To review a CAP for a finding, click the **View** link next to the finding (*Figure 31*).

<u>Vendor ID</u>	<u>Provider</u>	<u>Survey Name</u>	<u>Indicator ID</u>	<u>Finding Narrative</u>	<u>Service</u>	<u>Date CAP Entry Complete</u>	<u>Status</u>	<u>CAP</u>
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.2	This is a test finding for question 1.a.1.2	CMGT	10/6/2009	Reviewed	<a href="#">View</a>
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.3	This is a test finding for question 1.a.1.3		10/6/2009	Submitted	<a href="#">View</a>
4845	PURFOODS LLC.	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.3	This is a test finding for question 1.a.1.3	HDM		New	<a href="#">View</a>

Click to review a submitted CAP

*Figure 31 - View Link*



#### 4.5 Enter Case Manager Notes

After reviewing a CAP, navigate to the **For Case Manager Only** section of the screen (*Figure 32*) to enter Case Manager notes.

Click the **CAP Reviewed** check box.

Click the **Save** button to save the Case Manager notes and add an indicator that confirms the Case Manager reviewed the CAP (*Figure 33*).

**For Provider Only**

Date Planned Implementation: 10/27/2009

Title of Responsible Person: Coordinator

Name of Responsible Person: J. Smith

Corrective Action Plan: This is a test corrective action plan for indicator I.A.1.3.

---

**For Case Manager Only**

Case Manager Notes: Step 1

CAP Reviewed: ☐ Step 2

Save Step 3

☒ Email CAP to your supervisor if required...

Figure 32 - Enter Case Manager Notes

**For Case Manager Only**

Case Manager Notes: This is an example of Case Manager Notes

CAP Reviewed: ☒ Notes saved.

☒ Email CAP to your supervisor if required...

Figure 33 - Case Notes Entered, CAP Reviewed and Saved

## 4.6 Email a CAP

To e-mail the CAP with the Case manager's notes, click the **Email CAP to your supervisor if required** link to open an e-mail form.

Once the email form is displayed (*Figure 34*) enter the recipient's name in the **To:** field on the form.

Enter a message into the **Body:** field on the form.

Click the **Send CAP** button to email the CAP to the recipient.

**For Case Manager Only**

Case Manager Notes:

CAP Reviewed: ☐

☒ **Email CAP to your supervisor if required...**

From:

To:  (Use commas to separate e-mail addresses)

Subject: 23739 - BR - DA Provider Compliance Consumer Satisfaction Tool

Body:

*Figure 34 - Email a CAP with Case Manager Notes*

A CAP was successfully emailed to recipient confirmation message (*Figure 35*) appears below the E-mail form.

Bot:

This is a test emailed CAP

Statement of Confidentiality: The information in this message is privileged

Send CAP

CAP was successfully emailed to jemoolre@westcentral.in.com

Copyright © 2005 - 2009

*Figure 35 – CAP Email Confirmation Message*

When the Case Manager or Provider Representative completes the review of submitted CAPs in the Survey List, click the **Submit Reviewed CCAP** button (*Figure 36*) to notify the surveyor that the CAPs have been reviewed.

	DISTRICT							
33	AREA 7: WEST CENTRAL INDIANA ECONOMIC DEVELOPMENT DISTRICT	DA Provider Compliance Consumer Satisfaction Tool	I.A.1.3	This is a test finding for question 1.a.1.3	CMGT	10/7/2009	Reviewed	<a href="#">View</a>

**For Case Manager / Supervisor**

When you are done reviewing the list of submitted CAP(s) above you must click "Submit Reviewed CCAP" button to notify the surveyor.

**Submit Reviewed CCAP**

*Figure 36 - Submit Reviewed CCAP*

## Table of Figures

Figure 1 .....	<a href="#">CST Survey List Link</a>
Figure 2.....	<a href="#">Survey List Screen</a>
Figure 3.....	<a href="#">Survey Search Option</a>
Figure 4.....	<a href="#">Search for a Survey</a>
Figure 5.....	<a href="#">List of Surveys</a>
Figure 6.....	<a href="#">Findings Link</a>
Figure 7.....	<a href="#">List of Survey Findings – Survey Details</a>
Figure 8.....	<a href="#">List of Survey Findings – View Link</a>
Figure 9.....	<a href="#">CAP Details Screen</a>
Figure 10.....	<a href="#">Enter CAP in For Provider Only Section</a>
Figure 11.....	<a href="#">CAP Details Screen – Save and Submit Buttons</a>
Figure 12.....	<a href="#">Findings Screen with CAP Submitted Status</a>
Figure 13.....	<a href="#">Documents Link</a>
Figure 14.....	<a href="#">Upload Document Button</a>
Figure 15.....	<a href="#">Document Upload Window</a>
Figure 16.....	<a href="#">Document Type Drop-down Menu</a>
Figure 17.....	<a href="#">Document Description Field</a>
Figure 18.....	<a href="#">Choose File Button</a>
Figure 19.....	<a href="#">Upload File Button</a>
Figure 20.....	<a href="#">List of Uploaded Documents</a>
Figure 21.....	<a href="#">File Download Dialog Box</a>
Figure 22.....	<a href="#">List of Uploaded Documents Screen – Delete Link</a>
Figure 23.....	<a href="#">Warning Message</a>

Figure 24.....	<a href="#">Review Submitted CAPS</a>
Figure 25.....	<a href="#">Survey List</a>
Figure 26.....	<a href="#">Search Option</a>
Figure 27.....	<a href="#">Search for a Survey</a>
Figure 28.....	<a href="#">List of Surveys Meeting Search Criteria</a>
Figure 29.....	<a href="#">Survey Status</a>
Figure 30.....	<a href="#">Survey Details</a>
Figure 31.....	<a href="#">View Link</a>
Figure 32.....	<a href="#">Enter Case Manager Notes</a>
Figure 33.....	<a href="#">Case Notes Entered, CAP Reviewed and Saved</a>
Figure 34.....	<a href="#">Email a CAP with Case Manager Notes</a>
Figure 35.....	<a href="#">CAP Email Confirmation Message</a>
Figure 36.....	<a href="#">Submit Reviewed CCAP</a>